

Fortis



Getting Started

To get started, double click on the TSFARM icon on the desktop using your own login name and password. The Fortis icon on your remote desktop allows you to look into Fortis.

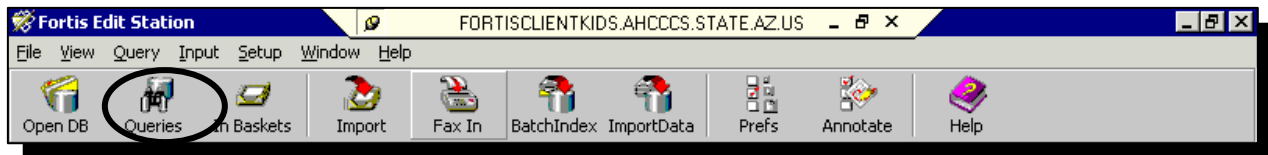


This will prompt you to enter a User name and Password. This will be the User name and password that you use to log in on your computer in the morning.

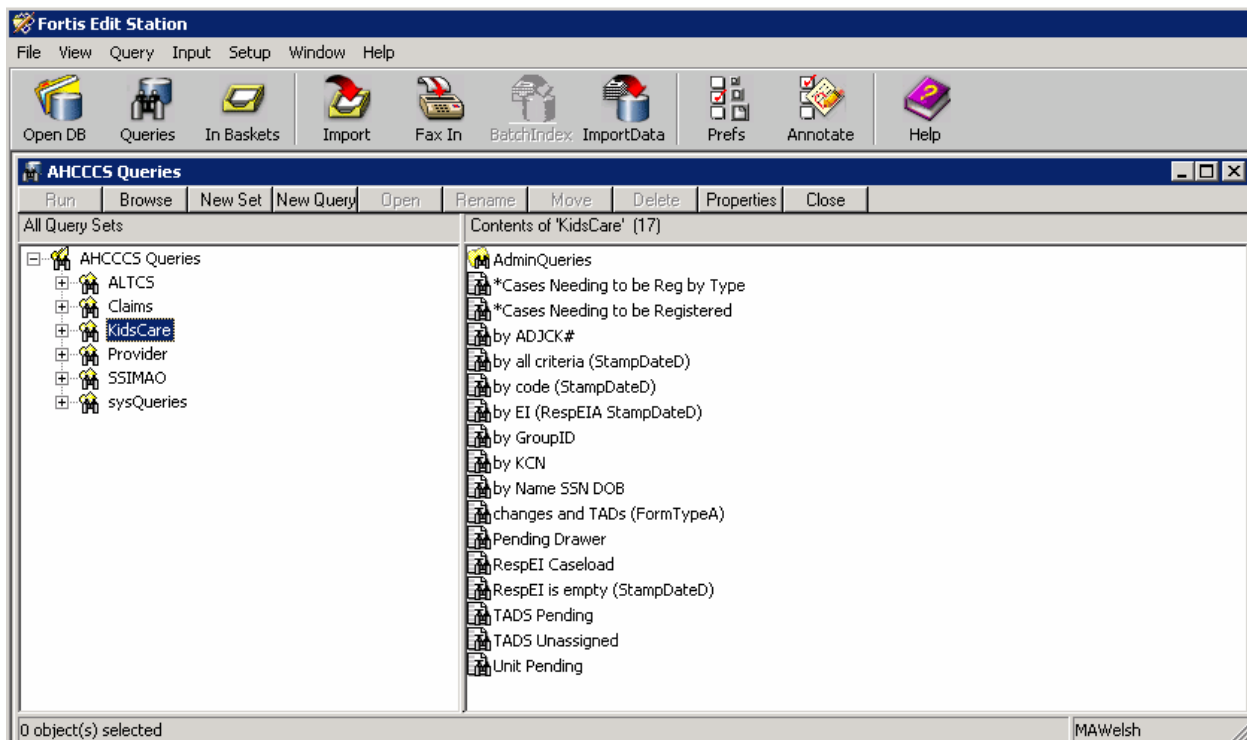


Queries

Fortis has many fields that are necessary to help find the information you need. The query function is how information is found in Fortis. To select a query, click on the Queries button from the tool bar at the top.



This will display a list of the different queries that are available in Fortis. The information that is needed will determine what type of query you will run.



Open the "by all criteria query".

Queries cont.

The "by all criteria query" is the most versatile one. It allows you to search through many different fields. If we wanted to know all of the intakes that have been date stamped between 9/15/2003 and 9/22/2003, we would enter 9/15/2003 in the Earliest StampDate field and enter 9/22/2003 in the Latest StampDate field. Then select "intake" from the FormType field.

Once you click OK, this will display a list all of the intakes that were received between 9/15/2003 and 9/22/2003.

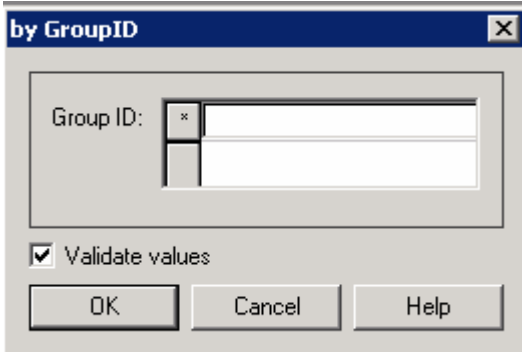
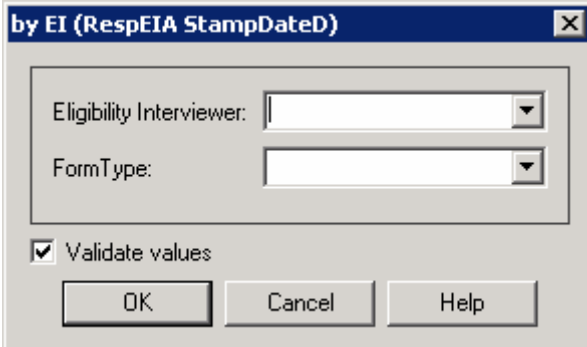
KNum	StampDate	RespEI	FormType	rtinentAppDat	Codes	SentToDES	PendingDueDate	Notes
0162864	09/22/2003	J005	intake					
0162865	09/22/2003	J005	intake					
0162872	09/22/2003	M005	intake		SP			
0162868	09/22/2003	J005	intake					NATIVE AME
0162871	09/22/2003	J007	intake					NATIVE AME
0162874	09/22/2003	J008	intake	09/22/2003				DONE
0104221	09/22/2003	J008	intake					
0069242	09/22/2003	K004	intake		SP			
0065047	09/22/2003	K001	intake					ADD ON ADI
0162888	09/22/2003	M001	intake					
0037218	09/22/2003	K005	intake					
0162885	09/22/2003	K005	intake					
0162881	09/22/2003	K005	intake					KNOWN TO

Criteria | Layout | Results | Full Text | Actions | Refresh | Open | Modify | Save Doc | Print Doc | Delete | Close

Number of documents has been limited to 200 by Query preference. 200 documents found

Queries cont.

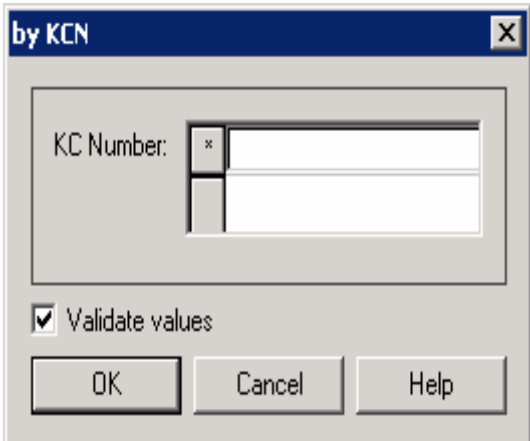
The "by EI" query searches your caseload in Fortis and selects the forms available that need to be processed in your Fortis Caseload. You can sort for a form type or all of the forms still waiting to be processed by you by typing your Fortis ID in the EI field.



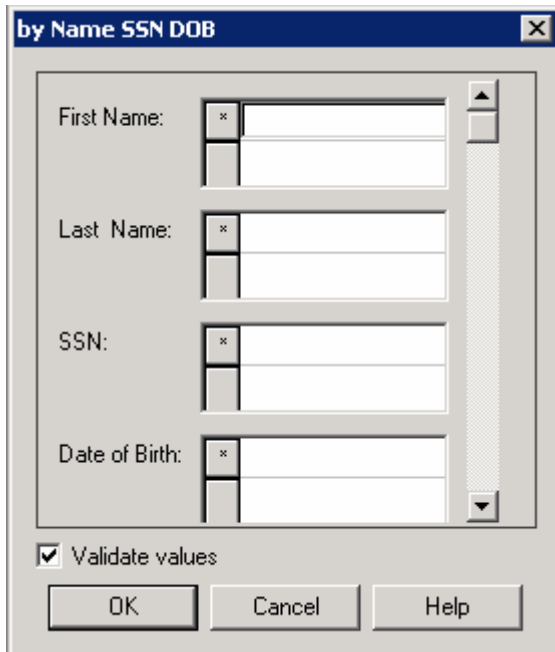
The "by GroupID" field uses the group number assigned to the case by ACE and selects that Group number and any verifications associated with that case.

You must type the "G" and then the group number to find your file.

The "by KCN" field searches for the case with the KidsCare number assigned to the case from the previous eligibility program. If a family has reapplied and they are linked together by the registration clerks, this will also pull up the most recent case and the G number. Only type the number of the K number, not the letter "K".



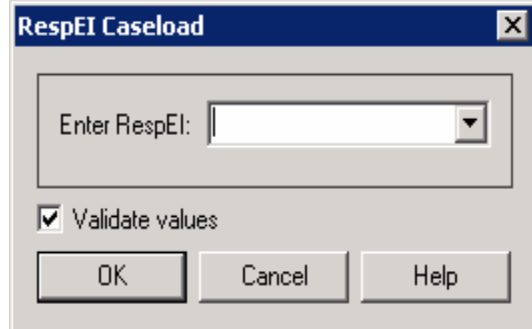
Queries cont.



The screenshot shows a dialog box titled "by Name SSN DOB". It contains four input fields, each with a small "x" icon to its left: "First Name:", "Last Name:", "SSN:", and "Date of Birth:". Each field has a vertical scrollbar on its right side. At the bottom of the dialog, there is a checkbox labeled "Validate values" which is checked. Below the checkbox are three buttons: "OK", "Cancel", and "Help".

The "by Name SSN DOB" query allows you to look up the case by the Primary informant's First name, Last name, Social Security Number or Date of Birth. You do not need all of this information though to pull up the case you are looking for. One or two of these fields will find the family.

The "RespEI" caseload query will only pull up the cases assigned to your Fortis ID with out being able to sort the results of the query.

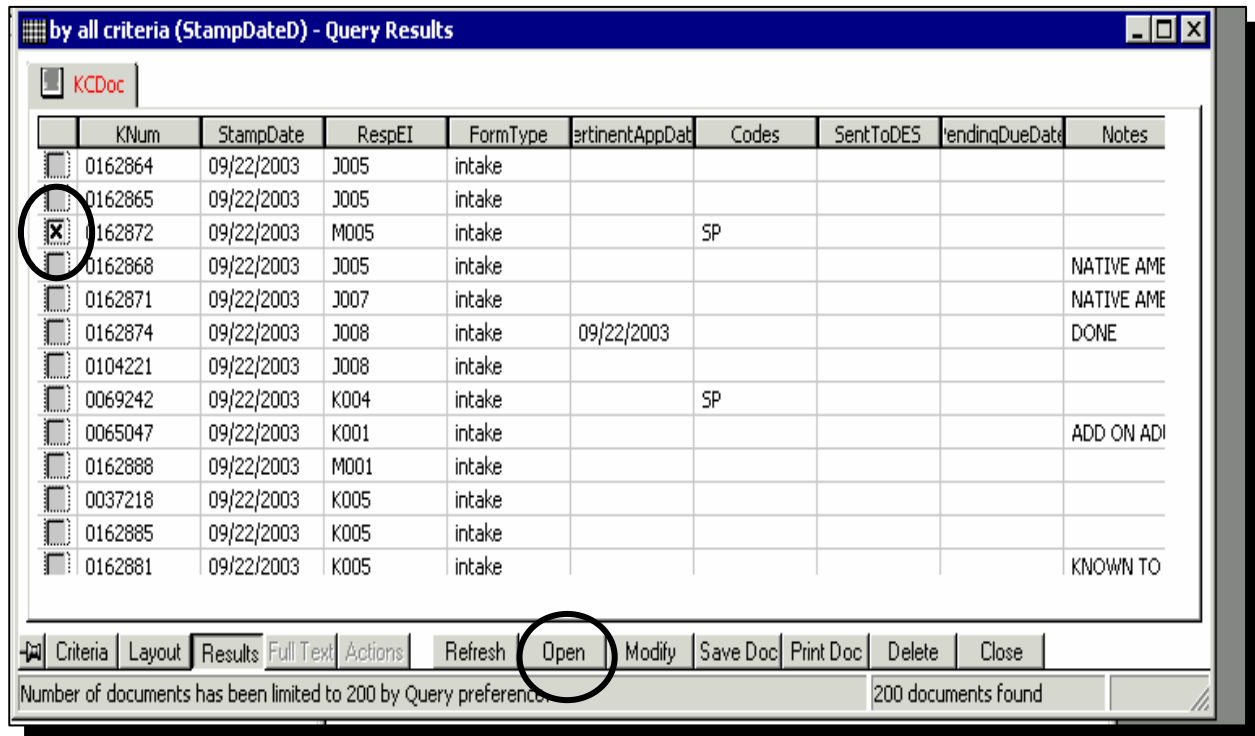


The screenshot shows a dialog box titled "RespEI Caseload". It contains a single input field labeled "Enter RespEI:" with a dropdown arrow on its right side. Below the input field is a checkbox labeled "Validate values" which is checked. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

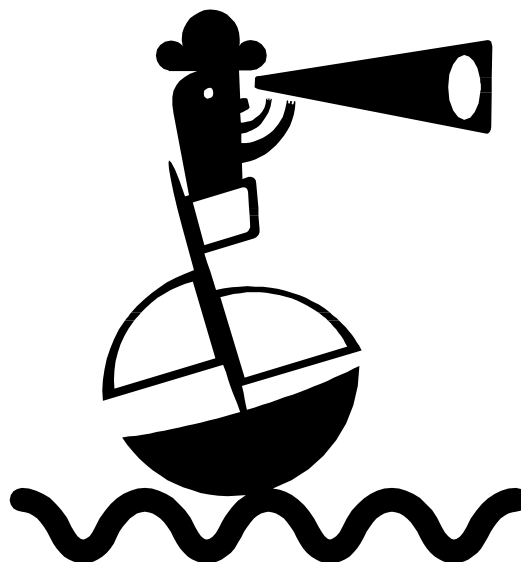
To pull up the cases assigned to you and be able to sort the form type, use the "By EI" search query.

Selecting a Document

Once the document has been found, click on the box next to the KNum field and press Open.



This will allow you to view the document.



Viewing the Document

When viewing a document you will see thumbnail views of pages on the left, the actual document in the middle, and many different fields on the right hand side of the screen. Each of these fields is used to help label the document in Fortis.

Fortis Edit Station

File Edit View Template OCR Link Input Setup Window Help

Open DB Queries In Baskets Import Fax In BatchIndex ImportData Prefs Annotate Help

Document in Folder KidsCare of Type KCDoc

Prev Doc Next Doc Modify Save Print View Doc View Data Launch Burst Close

1 of 9

Application for AHCCCS Health Insurance
Please complete pages 1 - 7.

A. Enter the name, address, and telephone number of the applicant or the responsible adult if you are applying for a child.

Name of applicant or responsible adult: Homer Simpson

Home Address: 1213 Evergreen City: Springfield State: AZ Zip Code: 85634 County: Maricopa

Mailing Address: same City: Springfield State: AZ Zip Code: 85634

Home Telephone: (602) 555-3333 Work Telephone: (602) 566-6543 Message or Cell Telephone:

B. What language do you speak? ☒ English ☐ Spanish ☐ Other

What language do you read? ☒ English ☐ Spanish ☐ Other

C. Is anyone included on this application pregnant?
☒ No ☐ Yes If Yes, who: When is the baby due? How many babies expected?

D. If everyone applying is not eligible for AHCCCS Health Insurance without a monthly premium, is someone willing to pay a premium for them?
☒ Yes ☐ No Only willing to pay a premium for these people:
(If no, we will not consider this as an application for AHCCCS Health Insurance that requires a premium.)

E. Enter a health plan that serves your county. Health plan choices are listed on page D.
My health plan choice is: Care 1st

⇒ If you want someone else to represent you complete section F. If not, go to page 2. ⇐

F. If you want to allow someone else to represent you or you have a legal guardian, provide the information below.

Representative's Name					
Representative's Home Address	APT*	City	State	Zip Code	County
Representative's Mailing Address	APT*	City	State	Zip Code	
Representative's Home Telephone	Representative's Second Telephone (work, message, cell)		Representative's Other Telephone (work, message, cell)		

By signing below, I:

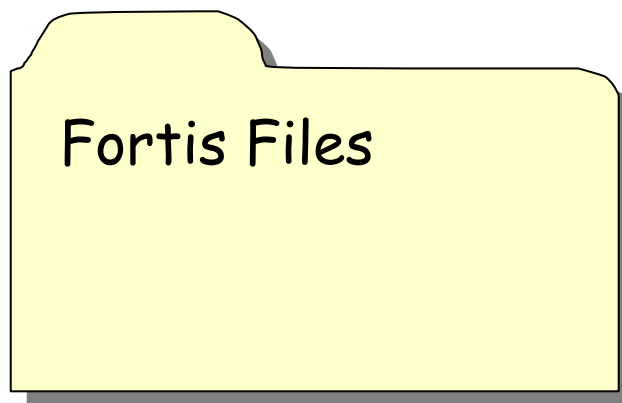
KidsCare

KNum: 9999999
StampDate: 09/08/2002
RespEl: X002
FormType: Intake
PertinentAppDate: 12/13/2004
Codes: training Doc
SentToDES:
PendingDueDate:
Notes: Training case.
ScanDate: 06/14/2004
GroupID: g10003245
PersonID:

Viewing the Document (cont.)

The following fields are used in Fortis.

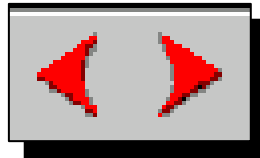
- **KNum** - the KCN.
- **StampDate** - the date the document was received in the office.
- **RespEI** - the eligibility specialist responsible for the document.
- **PertinentAppDate** - the application date that the information relates to.
- **Codes** - codes used to determine if special circumstances exist with the application.
- **Sent to DES** - the date the application was sent to DES.
- **PendingDueDate** - the date the Request for Information is due back.
- **Notes** - a place for miscellaneous information about the document.
- **GroupID** - This is the identification number assigned to the family in ACE.
- **PersonID** - This is the identification number assigned to the individual person in each family in ACE.



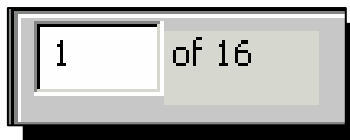
Viewing a Document cont.

There are three different ways to go from page to page in Fortis.

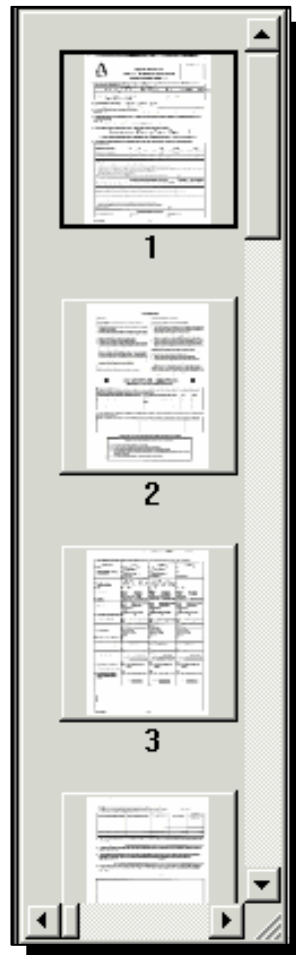
1. Click on the forward or backward arrow to go to the next or previous page



2. Select the page number you want to go to and press Enter.



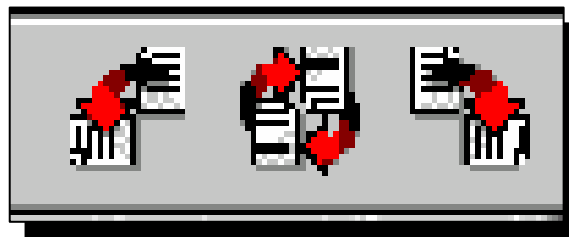
3. Select the thumbnail of the page on the left side of the screen.



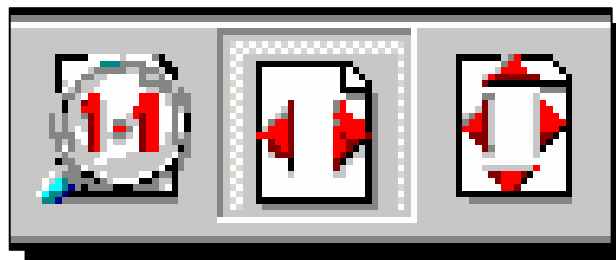
Viewing a Document cont.

When a document is not clear, or the print may be too small or too large, there are various things that can be done to make the information easier to read.

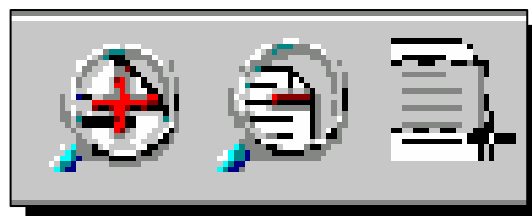
1. The document can be rotated left, rotated upside down, or rotated to the right.



2. The document can be resized to actual size, show the full width of the document in the viewing area, or fit the whole document in the viewing area.

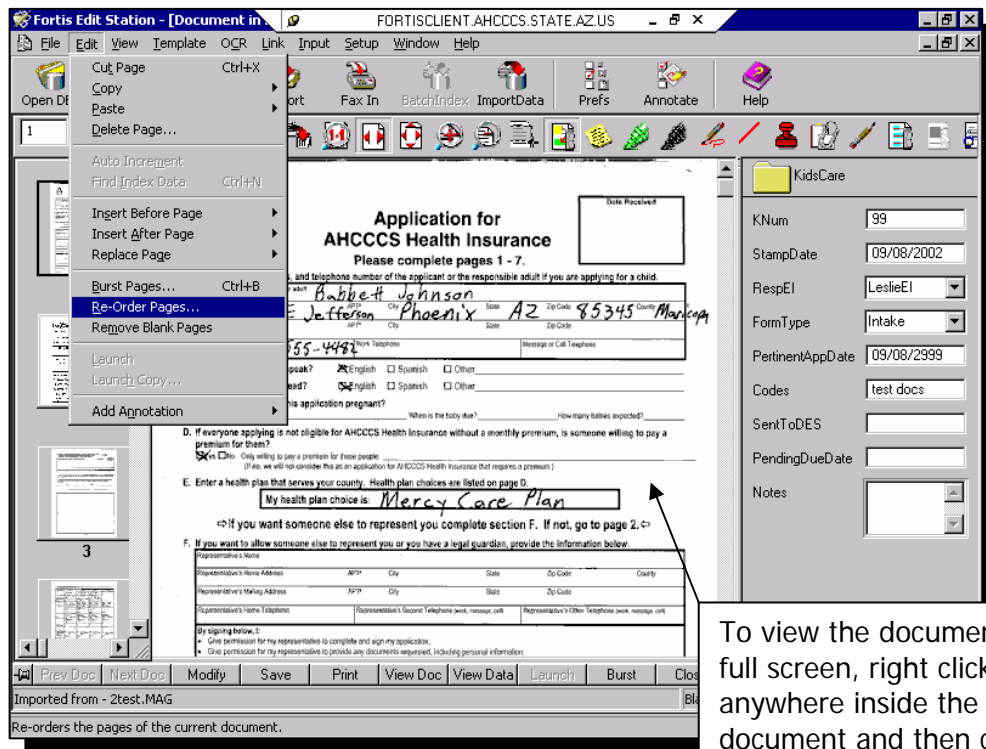


3. The document can be zoomed in, zoomed out, or a box can be placed around an area to be zoomed in on.

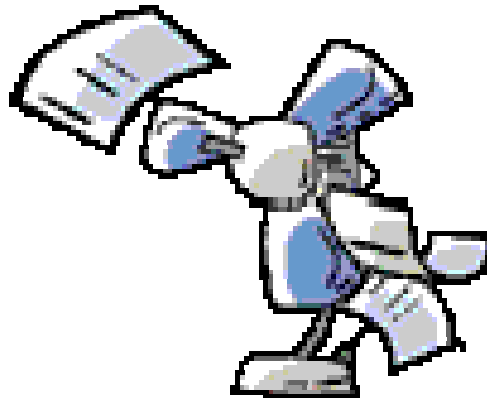


Re-Ordering Pages

When you would like to change the order of the pages within a document, the first step is to click Edit on the toolbar and select Re-Order Pages.

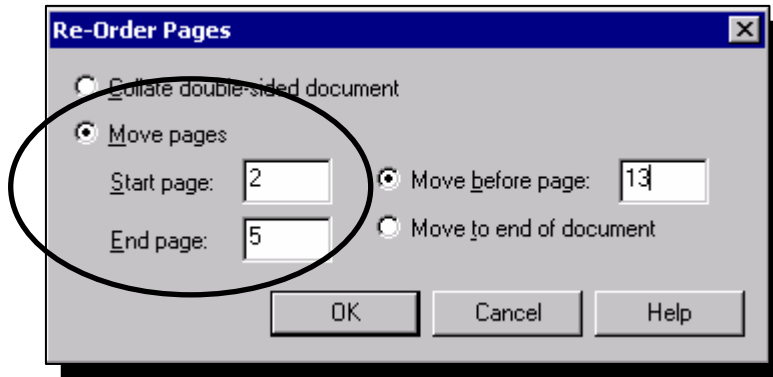


To view the document full screen, right click anywhere inside the document and then click on "Full Screen".

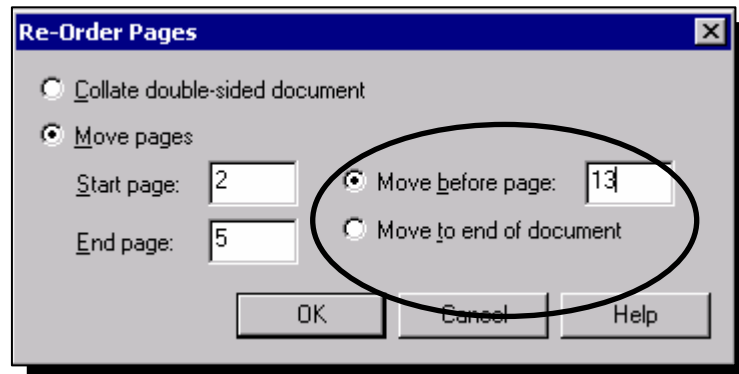


Re-Ordering Pages cont.

This will allow you to change the order of the pages. On the left side of the window, you need to select the start and end pages that you would like to move. For example, if you would like to move pages 2 through 5, put a 2 in the Start page field and a 5 in the End page field.



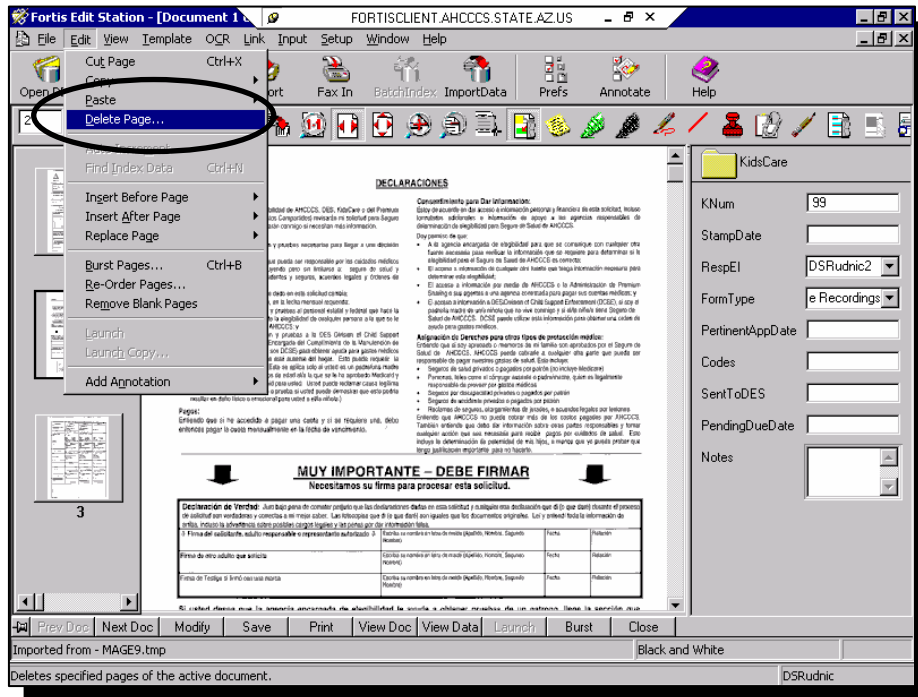
On the right side of the window, you need to select where you are going to send the pages in the document. You have the choice of placing them before a particular page or placing them at the end of the document.



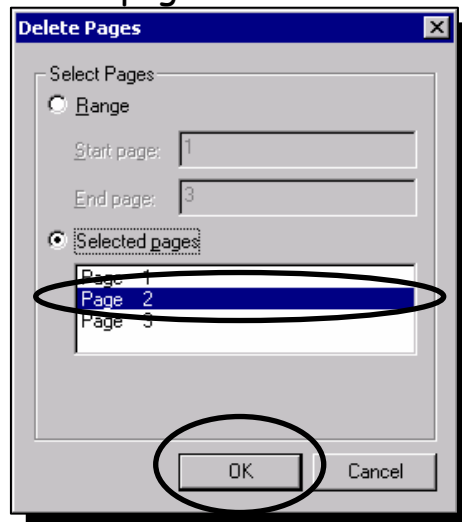
Now pages 2 through 5 will be moved to precede page 13.

Deleting Pages

If a page in a document is blank, it needs to be deleted. For example, on an application that has frontside English and backside Spanish and the customer only fills out the English side, you would delete the blank Spanish pages. Goto Edit and click on Delete Page.



This will bring up a window where you will select the pages you want to delete. For example, if you want to delete page two, click on Page 2, then click OK. The selected pages will now be deleted.



Important:

Make sure you look at the entire page prior to deleting.

Highlighting

To highlight, click on the Highlight Annotation button. A cursor will appear.



Select a box around the area that needs to be highlighted.

A. Enter the name, address, and telephone number of the applicant or the responsible adult if you are applying for a child.

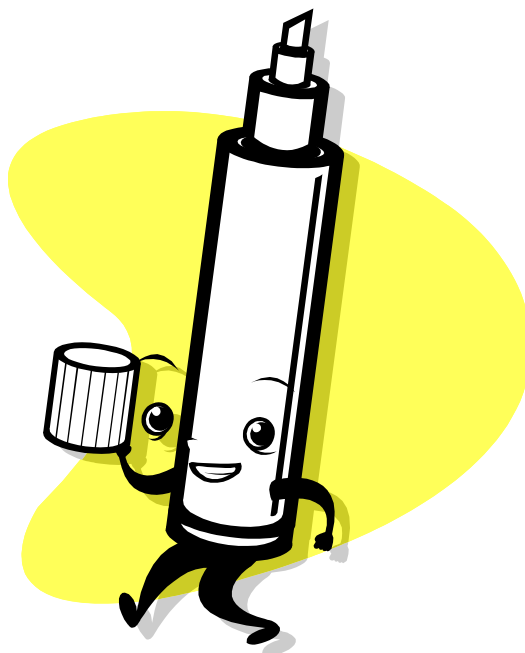
Name of applicant or responsible adult	Babbett Johnson				
Home Address	APT#	City	State	Zip Code	County
801 E Jefferson		Phoenix	AZ	85345	Maricopa
Mailing Address	APT#	City	State	Zip Code	
Home Telephone	Work Telephone			Message or Cell Telephone	
(602) 555-4482					

B. What language do you speak? ☒ English ☐ Spanish ☐ Other _____

What language do you read? ☒ English ☐ Spanish ☐ Other _____

C. Is anyone included on this application pregnant? ☒ Yes ☐ No

If Yes, who? _____ When is the baby due? _____ How many babies expected? _____

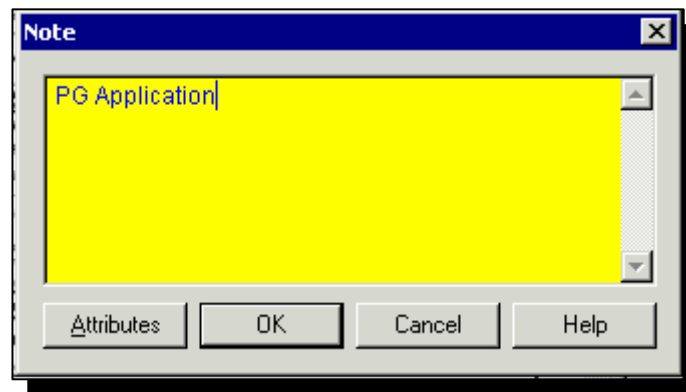


Note Annotation

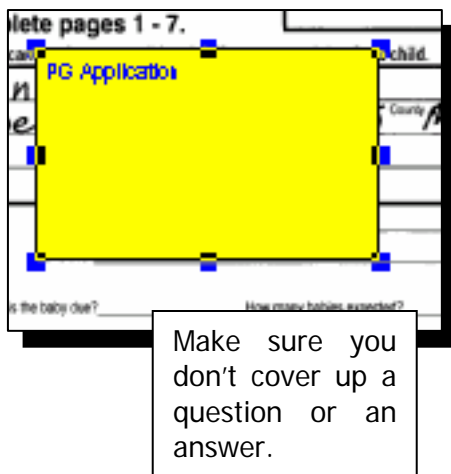
Click on the Note Annotation button to create a new note.



This will bring up the Note screen. Type any notes that need to be added to the case file on this screen and click on OK.



Now the Note Annotation will show up on the document being working on. Move around the box by clicking on the box and dragging it around to its proper spot. To shrink or enlarge the box, click on the box and click on one of the corners and either expand or shrink the box.



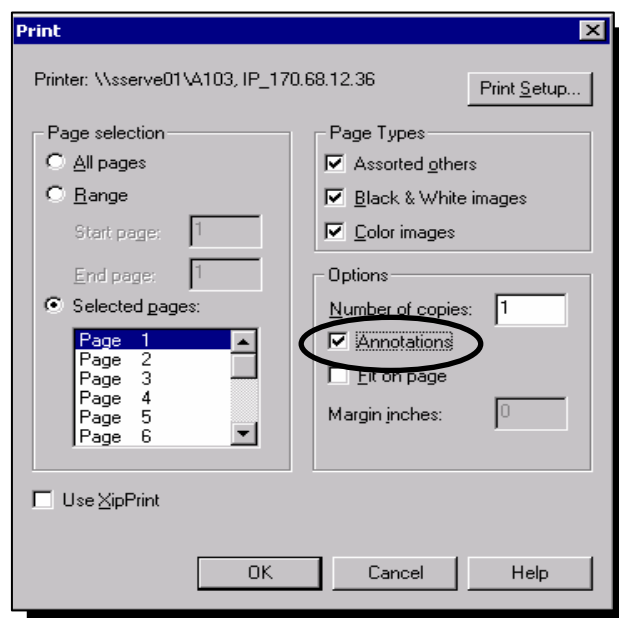
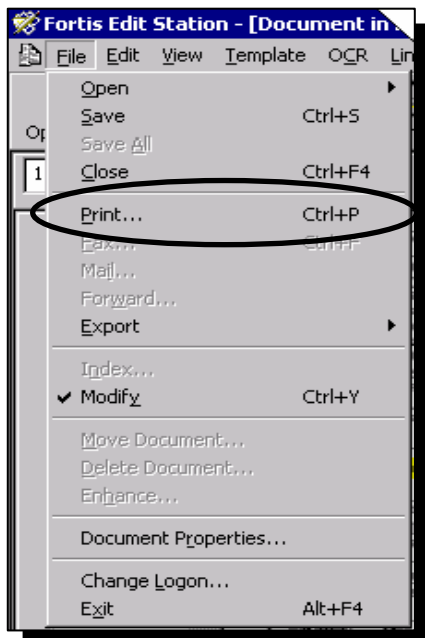
 A screenshot of an 'Application for AHCCCS Health Insurance' form. The form includes a header with the AHCCCS logo and the text 'Please complete pages 1 - 7.' Below this is section A, 'Enter the name, address, and telephone number of the applicant or the responsible adult if you are applying for a child.' The form is filled out with handwritten information: Name: Abbe H Johnson, Address: 801 E Jefferson, City: Phoenix, State: AZ, Zip Code: 85345, County: Maricopa, Telephone: (602) 555-4481. There are checkboxes for language (English, Spanish, Other) and pregnancy status. The form is partially obscured by a yellow note box at the top left.

Printing Documents With Annotations in Fortis

Any annotations made on any page of a document will appear when printed. Any part of the document that is highlighted with the highlighter will now be covered when printed out.

The screenshot shows a multi-page form titled "Fortis Edit Station - [Document in...]" with a "Print" button. The form contains various fields for personal information, including name, date of birth, gender, race, and address. A yellow highlighter annotation is visible on the form, stating: "All children are applying for Kids Care." The form is labeled "Page 3" at the bottom right.

When printing documents that contain highlighter annotations, be sure to uncheck the annotations box before printing. This will ensure that the annotations will not be blocking any of the pages of the document.



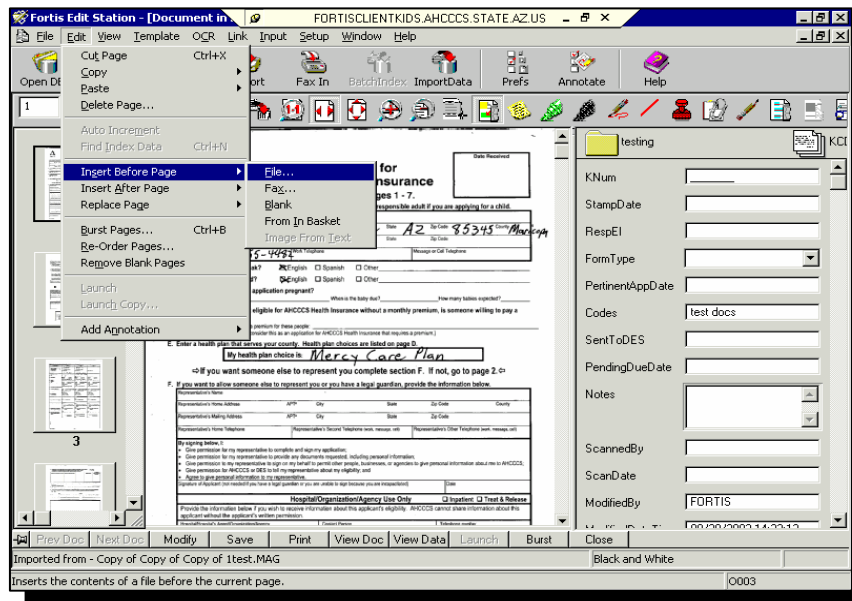
Importing Documents

Eligibility Specialists import screen prints including WTPY's, PMMIS, Forms and SAVES. There are two steps to importing a document.

1. Saving the document:

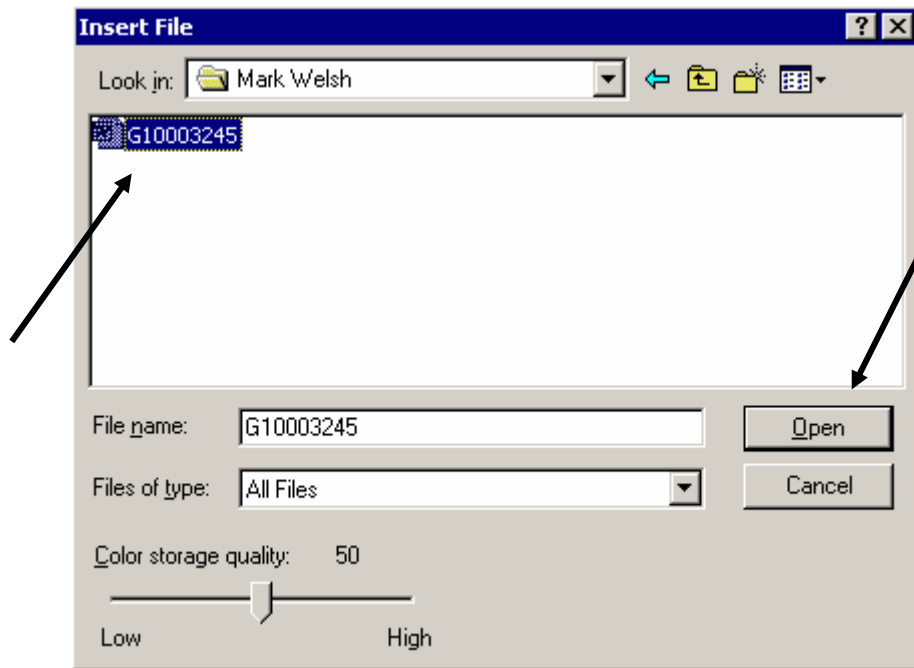
Screen Prints	Word and Excel
<ul style="list-style-type: none"> Go to File and select Print Screen. Select Options. Check Print to file and click on the Browse button. Save the document. Click on OK. 	<ul style="list-style-type: none"> Go to File and select Save As Save the document. Click on OK.

2. The second step is to insert the document into Fortis. Once the document has been saved, go to Edit, Insert Before Page, and then File.

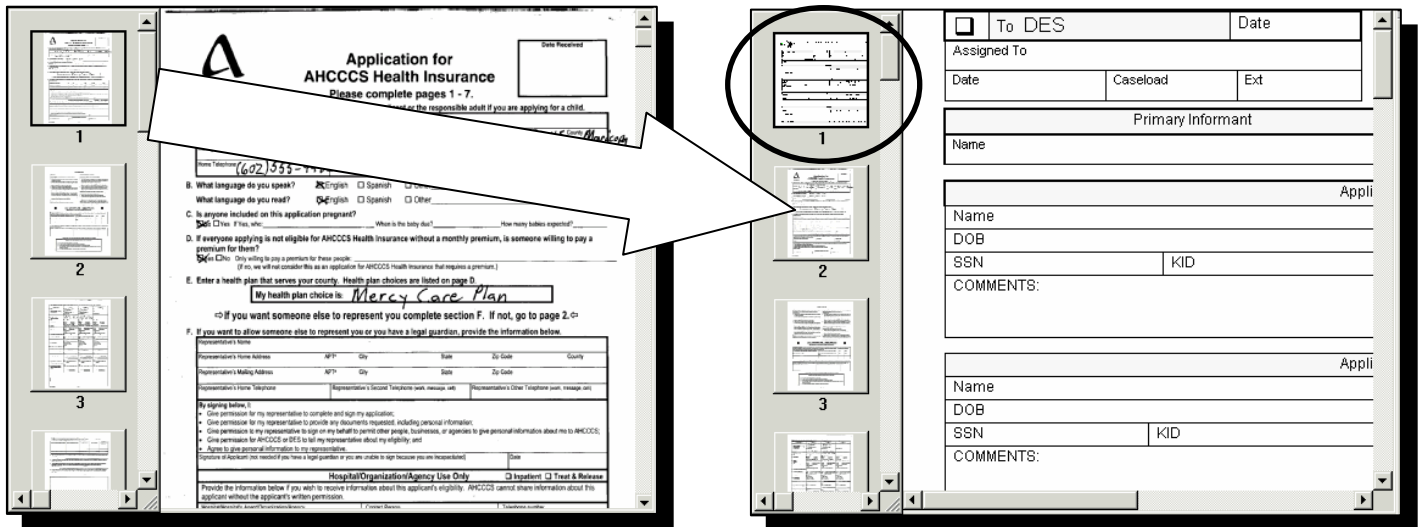


Importing Documents, cont.

Select the file (Word Document, WTPY, etc.) that was saved and click Open.



The document has now been imported and is the first page of the thumbnail pictures.



Launching

Once you have filled out a form and imported it into Fortis, you can still change the information that is on the form. To do this, select the form that you would like to update, then click the launch button.

Name of person contacted: Jan Smith	
Name of organization contacted: Jan Smith Day Care	
Verification/Clarification of: Daycare Expenses	
Verified that Jimbob Smith pays \$40 a week for Jan Smith to watch Jethro.	
EI: David Rudnick	Date: 6/17/04

Name of person contacted:
Name of organization contacted:
Verification/Clarification of:

cc	Modify	Save	Print	View Doc	View Data	Launch	Burst	Close
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Launching cont.

Once you click on the launch button, the form will open in the program where it was created. For example, the Record of Telephone Contact is made in Microsoft Word so it will be launched in Microsoft Word.

mag34 - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Normal Arial 11 B I U

Verified that Jimbob Smith pays \$40 a week for Jan Smith to watch Jethro.

EI: David Rudnick	Date: 6/17/04	Time: 9:00 AM
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Name of person contacted: Title:

Name of organization contacted: Phone Number:

Verification/Clarification of:

EI: David Rudnick Date: Time:

Once you have launched the form, you can now type in the new information.

mag34 - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Normal Times New Roman 10 B I U

Verified that Jimbob Smith pays \$40 a week for Jan Smith to watch Jethro.

EI: David Rudnick	Date: 6/17/04	Time: 9:00 AM
-------------------	---------------	---------------

Name of person contacted: Apu Nahasapimetalipari Title: Manager

Name of organization contacted: Kwik-e-Mart Phone Number: (602) 555-6669

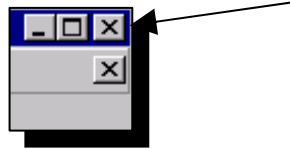
Verification/Clarification of: Employment

Verified that Jimbob Smith stopped working at Kwik-e-Mart on 5/10/04 and did not have any insurance.

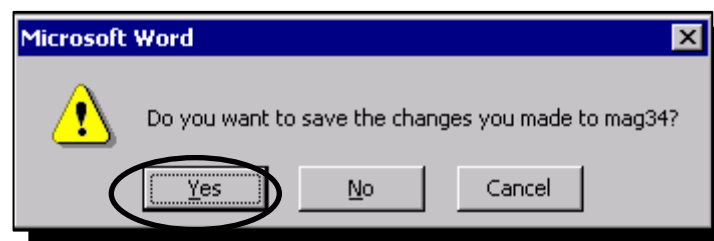
EI: David Rudnick	Date: 6/18/04	Time: 2:15 PM
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Launching cont.

Once you have completed entering the new information into the form, click on the "X" in the upper right hand corner.



This will prompt you to save changes, click on "Yes".



The information you just entered into the form will now appear on the imported form.

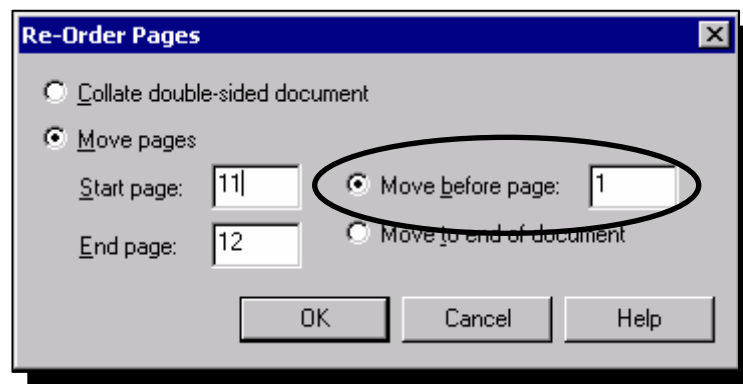
Name of organization contacted: Jan Smith Day Care	
Verification/Clarification of: Daycare Expenses	
Verified that Jimbob Smith pays \$40 a week for Jan Smith to watch Jethro.	
EI: David Rudnick	Date: 6/17/04
Name of person contacted: Apu Nahasapimetalipan	
Name of organization contacted: Kwik-e-Mart	
Verification/Clarification of: Employment	
Verified that Jimbob Smith stopped working at Kwik-e-Mart on 5/10/04 and did	
EI: David Rudnick	Date: 6/18/04

Loc Modify Save Print View Doc View Data Launch Burst Close

Bursting

Eligibility Specialists burst documents as needed, particularly when the document has permanent verification that is received with a new application. They will need to copy indices from the larger document (parent document) and then make minor modifications to the indices for the document that was bursted (child document).

When bursting a document, make sure to re-order the pages so the pages that need to be bursted are the first pages. For example: if the bottom two pages are verification and need to be separated out, select the page numbers and make sure to move them before page 1.



Bursting cont.

Once the pages that need to be bursted out are the first pages, select the last page that is going to be bursted and then press the burst button.

The screenshot shows a web application interface for document bursting. On the left, a vertical list of document pages is shown, with page 2 circled. The main area displays the content of page 2, which includes a form titled 'DECLARACIONES'. The form has several sections: 'Comprensión', 'Consentimiento para Dar Información', and a prominent section titled 'MUY IMPORTANTE - DEBE FIRMAR' (Very Important - Must Sign). The bottom toolbar contains buttons for 'Prev Doc', 'Next Doc', 'Modify', 'Save', 'Print', 'View Doc', 'View Data', 'Launch', 'Burst' (highlighted with a red circle), and 'Close'. On the right side, there is a sidebar with a folder icon labeled 'testing' and a list of fields: KNum, StampDate, RespEI, FormType, PertinentAppDate, Codes (with 'test docs' entered), SentToDES, PendingDueDate, and Notes.

This will take you to the bursting screen. When bursting a document, make sure that the document is being bursted into the KidsCare folder and also check the Index Data box and press Set.

The 'Burst To' dialog box is shown. It has a title bar with 'Burst To' and a close button. Inside, there are two radio buttons: 'In Basket' and 'Database' (selected). Below them is a 'Folder:' dropdown menu with 'KidsCare' selected. To the right of the folder dropdown is a 'Document Type:' dropdown menu with 'KCDoc' selected. In the center, there is a checkbox labeled 'Index data' which is checked and circled in red. Next to it is a 'Set...' button. At the bottom, there is a 'Document description:' text field. The bottom of the dialog has three buttons: 'OK', 'Cancel', and 'Help'.

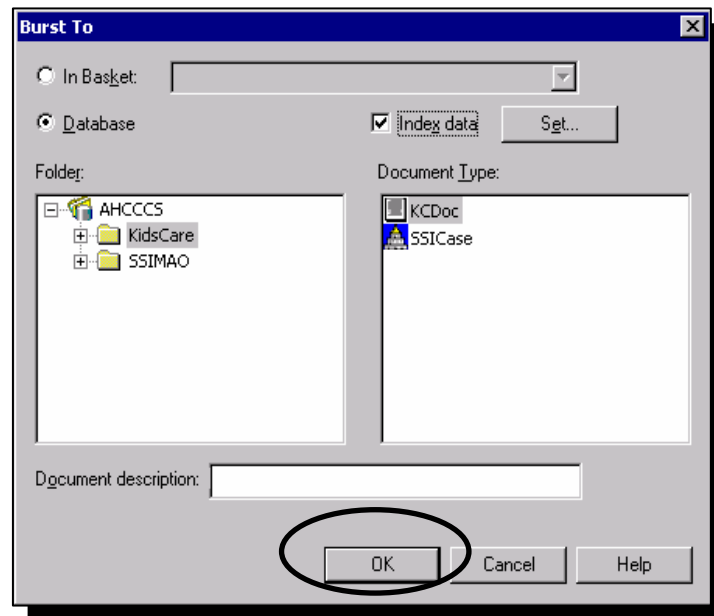
Bursting cont.

Once you press the Set button, you will be taken to the Set Index Data screen. On this screen make sure to enter the StampDate, RespEI (which is you) and FormType and scroll down to enter the GroupID . Then click on the "OK" button.

The screenshot shows a Windows-style dialog box titled "Set Index Data". It has two tabs at the top: "KidsCare" (active) and "KCDoc". Below the tabs are several input fields with labels on the left and text boxes on the right. The fields are: "KNum" (9999999), "StampDate" (06/27/1972), "RespEI" (DSRudnic2), "FormType" (Permanent Verification), "PertinentAppDate", "Codes", "SentToDES", and "PendingDueDate". At the bottom of the dialog are four buttons: "Increment...", "OK" (which is circled with a black oval), "Cancel", and "Help".

Bursting, cont.

You will then be taken back to the Burst To screen, click on "ok" again.



Now the document has been bursted out, and you will need to run a query to view the document, as it is now a separate document.

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